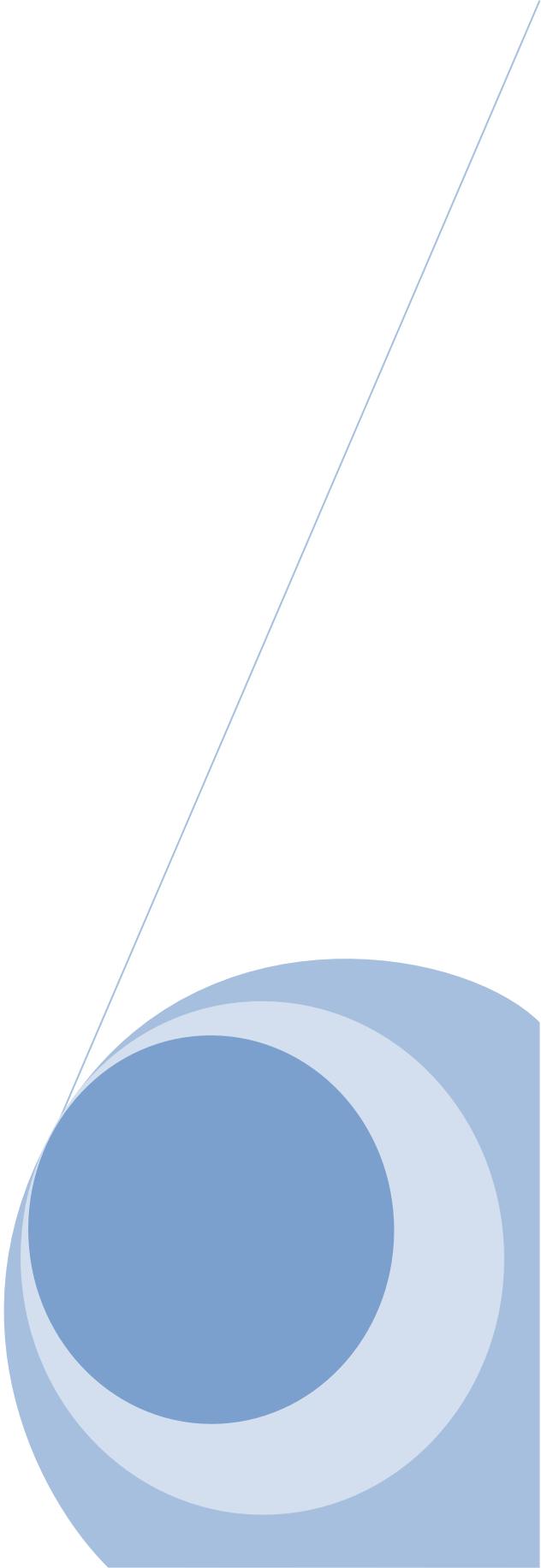


Business Process Guide

Graduate Student Financials –
DGSA Documentation

6/11/2021



Document Revision History

Document Title – Graduate Student Financials – DGSA Documentation

Date	By	Action	Pages
08/01/2019	Tom Johnson	Creation Date	26
10/02/2019	Tom Johnson	Initial Release to DGSA's	29
10/15/2019	Tom Johnson	Document updated to reflect code changes	32
04/30/2020	Tom Johnson	Updated to add Actuals documentation	47
05/20/2020	Tom Johnson	Updated	43
5/30/2020	Tom Johnson	Updated with Regina and Iryna Corrections	42
06/05/2021	Tom Johnson	Update for DukeHub2.0	43

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Summary of Process

The *Graduate Student Financials* (GSF) module is a Duke created system to track graduate student funding starting from the Offer of Admissions - Award Letter through disbursement to the student account. GSF is designed to provide reporting at each important step, and give users in both the Graduate School and in the Departments an easy and intuitive tool for tracking student funding.

After close examination of the WebApp tool, the Graduate School and the SISS Office worked together to create a new structure that combined the best features of the existing WebApp tool and the possibilities of what could be done in PeopleSoft. GSF is the result.

This document is designed to help users understand how to use GSF on a daily basis.

Important Concepts

- **Emplid** – Since GSF is built within PeopleSoft, it uses Emplid as the primary identifier for students. (There are other identifiers you can use in a search like last name, first name, and Duke Unique ID.)
- **Aid Year** – All awards in GSF are entered by Aid Year. This is a concept supported in the WebApp, and is similar to what is in the Financial Aid module in PeopleSoft.
- **Projections** – Student data in GSF is tracked in two separate ways and on two separate pages. For planning/budgeting purposes, student data is held/displayed in the Projections pages. The projection pages are used at the beginning of the planning cycle to track potential/projected spending. (These pages appear very similar to the Actuals pages that are used later in the student cycle).
- **Actuals** – Once the planning portion of the calendar has been completed, student data will be rolled to the Actuals pages. Data added and updated on these pages will eventually be pushed to the Financial Aid module in PeopleSoft where it will then disburse to student accounts.
- **GradPacks** – GradPacks are a way to automatically add funding to a student based on Academic Plan and Year of Study. Most student funding follows similar rules for students in the same departments, and GradPacks establish these rules within GSF.
- **Academic Plans** – Academic plans show up in 4 different ways in GSF. They can all be distinct, but it is most likely there will be overlap between several of these Academic Plan fields.
 - Original Academic Plan is the plan that is initially assigned to the student in PeopleSoft. This value defaults in from the Student Program/Plan page for returning students, or it is added via the Add Student process.
 - Reporting Academic Plan is the plan that identifies the department that has financial responsibility for the student.
 - Security Plan 1 identifies a department that shares some responsibility for a student and needs to see how a student is funded.
 - Security Plan 2 identifies a department that shares some responsibility for a student and needs to see how a student is funded.
- **Notes** – Brief additional incidental information about a student and/or their funding can be documented in this section. Notes allow both TGS and the Departments to communicate short, predetermined messages to each other.
- **Comments** – Sometimes it is necessary to add more extensive detail about a student's situation. Comments are PeopleSoft's method of adding, updating, and tracking this type of detail.

- **WorkCenters** – GSF can be navigated either via the regular menus in PeopleSoft, or by using the GSF WorkCenter. The WorkCenter is a tool that holds all the pages needed for working in GSF in one place, for easy access.

GSF Primary pages

GSF has two sets of primary pages that will be used by DGSA's.

1. **GSF Projections** - These pages will only be used for the purpose of creating the Annual Budget.
 - a. **Student Awards – Projections**
 - i. TGS will add all current PhD student records into Student Award – Projections pages for the new budget year. DGSA's will update, review, and submit student funding records for all active students.
 - b. **Add New Student – Projections**
 - i. DGSA's can create a new *Dummy* Student record that can act as a template for other anticipated new admits and submit for approval.
 1. Once created, these *Dummy* Students can be used as a template to create other *Dummy* Students. This is done on the Student Award Projections page by clicking the *Copy IDs* hyperlink. (This link only appears for *Dummy* students.)
2. **GSF Actuals** – These pages will be used throughout the year to provide data for Fall and Spring Variance reports, various state and university reports as well as for posting tuition, fee, and health insurance awards to the student accounts.
 - a. **Student Award – Actuals**
 - i. Prior to the beginning of the new fiscal year, TGS will roll over all of the Student Award Projections into Student Award –Actuals page. Throughout the year, this is the page you will use to update student funding once the fiscal year begins.
 1. Note – *Dummy* Students are not rolled to Actuals

b. Add New Student – Actuals

- i. DGSA's will add existing students when needed (for instance, if there is a new matriculant) and submit for approval.

Additional Note on using GSF

GSF was designed to be best viewed by monitors that are ~22 inches or larger. You can view GSF on monitors that are smaller, but the pages will push off the screen.

DukeHub/PeopleSoft Topics

Database Instances

At Duke, there are several different PeopleSoft databases. Most users are familiar with the Production database, and spend most time working in that environment.

PRD

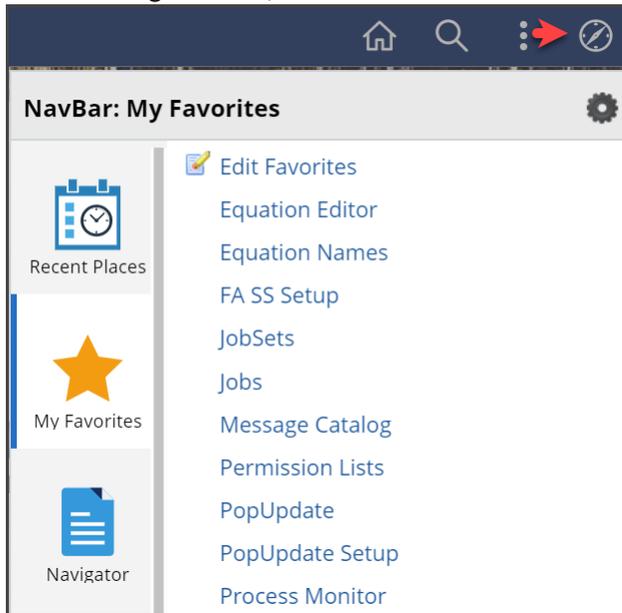
The DukeHub Production environment. This is the official database where student data is housed and work is done. Queries and reports are run from this environment.

TST

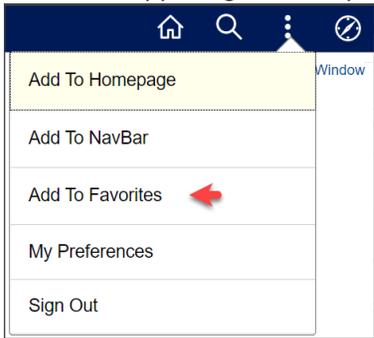
DukeHub testing environment. This database is a copy of PRD, and is refreshed every two weeks. Users can test new business processes in this instance, and work on new updates and modifications to PeopleSoft. *Many DGSAs will never use this database.*

Using Favorites in PeopleSoft

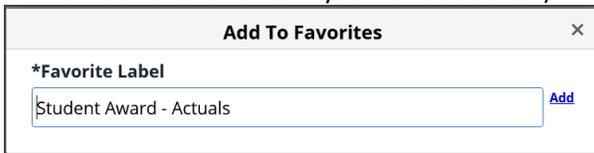
DukeHub allows users to add Favorites, which are accessible via a dropdown menu in the top, right part of the page. Click the Navigator icon, then click the Favorites icon in the drop down menu.



Users can add Favorites by first navigating to any page. Once on the page to be selected as a favorite, click the kebob icon on the upper right of the page. Select Add to Favorites.



A modal window will pop up. Click Add to add the name you would like for this page. Click Save. (You can update the name of the Favorite if you want to do so.)



The page will then be added to your Favorites.



You can review and Edit your Favorites by returning to the Favorites menu, and selecting the Edit Favorites link, and the top of your Favorites list.



Security Access in DukeHub/PeopleSoft

Page Security

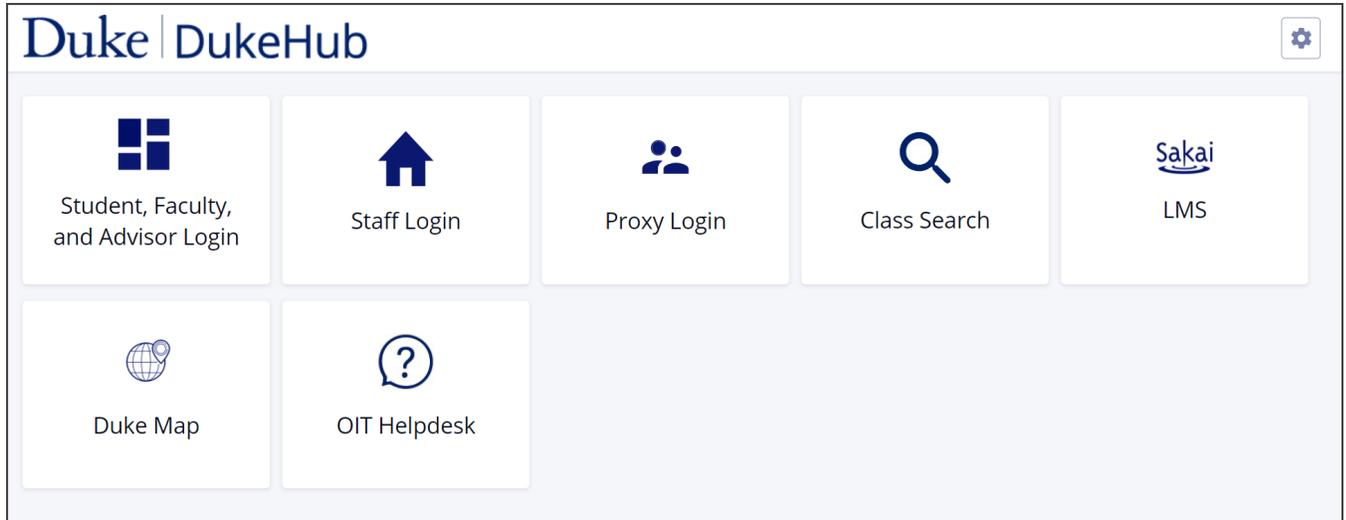
Users must be granted explicit permission within DukeHub to visit certain pages. If a user does not see a page that is in this documentation, it is likely that the security has not been completely set for that ID. Contact the Graduate School to verify security access.

Academic Plan Security

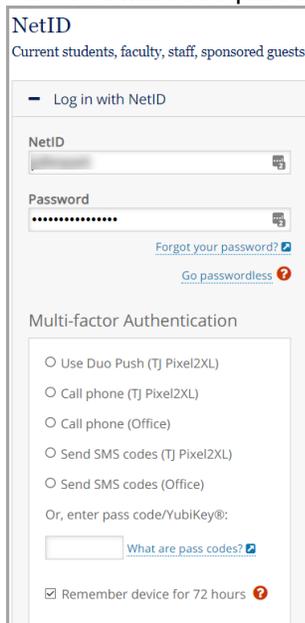
Users must also be granted security to see student data for specific academic plans. This Academic Plan security applies throughout DukeHub, and will be used when looking at data in GSF, Admissions and Student Program/Plan pages.

Navigating to the GSF WorkCenter

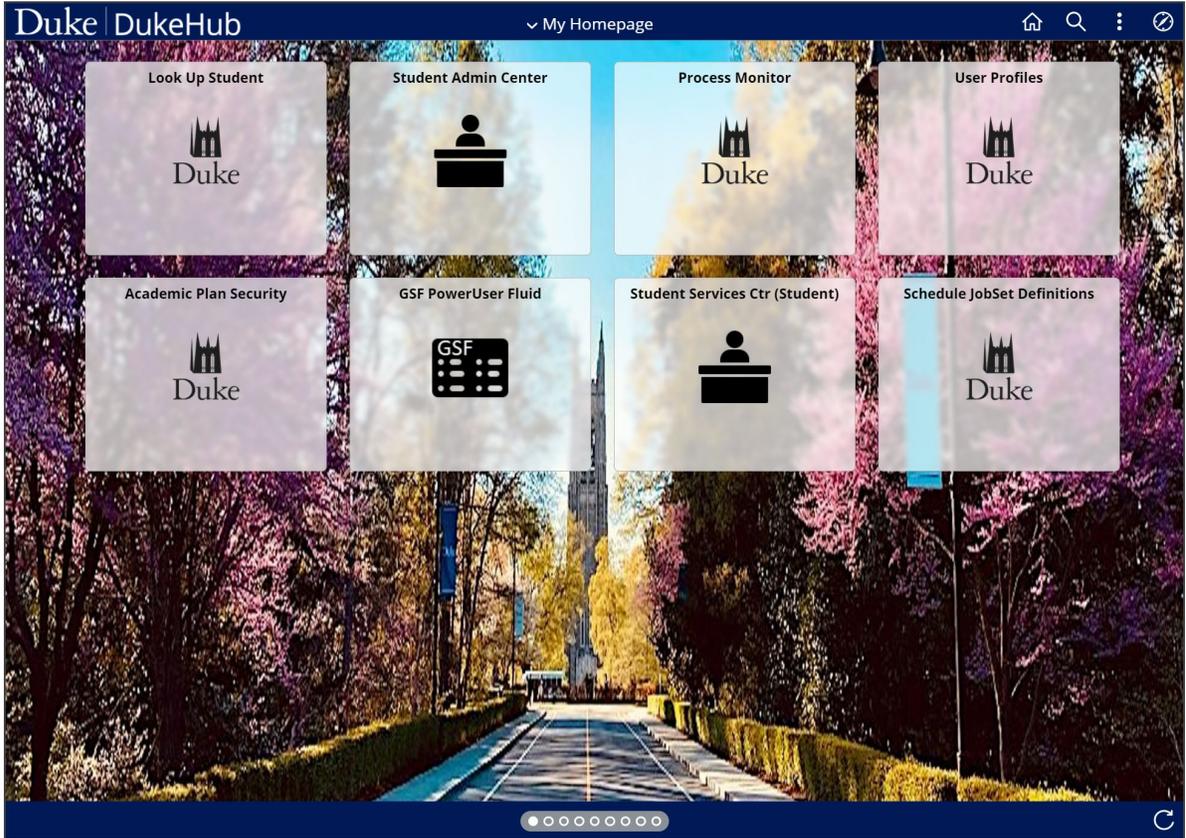
1. To navigate to the GSF WorkCenter, first log into DukeHub at <https://dukehub.duke.edu/>.
2. Click the Staff Login button.



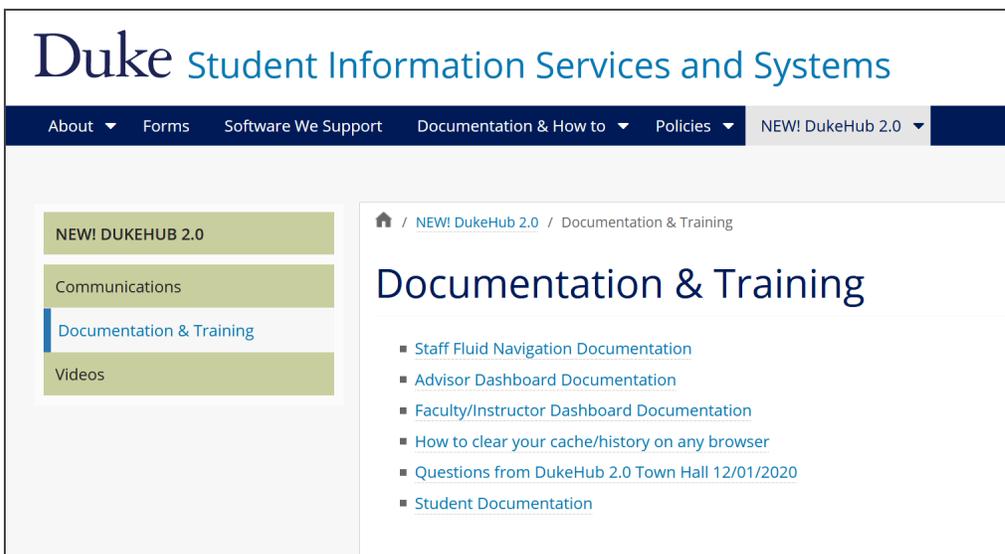
3. You will be required to use Multi Factor Authentication to log into DukeHub

The image shows the NetID login form. At the top left is the "NetID" logo. Below it is the text "Current students, faculty, staff, sponsored guests". The form has a section titled "Log in with NetID" with a minus sign icon. Below this are two input fields: "NetID" and "Password". The password field is masked with dots. Below the password field are two links: "Forgot your password?" and "Go passwordless". Below these is a section titled "Multi-factor Authentication" with a list of radio button options: "Use Duo Push (TJ Pixel2XL)", "Call phone (TJ Pixel2XL)", "Call phone (Office)", "Send SMS codes (TJ Pixel2XL)", and "Send SMS codes (Office)". Below the list is the text "Or, enter pass code/YubiKey:" followed by an input field and a link "What are pass codes?". At the bottom of the form is a checkbox labeled "Remember device for 72 hours".

4. This will take you into DukeHub, and to your Homepage.
 - a. Your homepage background will change throughout the year, based on the season.
 - b. Additionally, the Tiles on your Homepage may be different than what is displayed here.



5. For additional information on how to configure and update your Homepages, visit the SISS Office Website, [Documentation and Training](#) page.



6. Once logged into Duke Hub, click the Navigator icon, in upper right corner.
7. Select Main Menu, Campus Solution Content> Functional Work Centers> GSF Work Center
8. The GSF WorkCenter will appear similar to what is seen below.
9. Users can navigate through the WorkCenter by clicking links in the Navigation Pane on the left.
 - a. After clicking a link, the page will appear in the Work Area, which is the center of the page
10. Other pages are available by clicking the Reports tab, or the GSF Student tab

The screenshot displays the GSF Workcenter interface. At the top, there is a navigation bar with a home icon, a search icon, and a refresh icon. Below the navigation bar, the page title is "GSF Workcenter" and the sub-header is "Graduate Student Financials WorkCenter".

The interface is divided into two main sections:

- Navigation Pane (Left):** This pane contains several sections:
 - GSF Welcome:** Includes a refresh icon and a menu icon.
 - GSF Projections:** Includes a refresh icon and a menu icon.
 - Student Award - Projections:** Includes a refresh icon and a menu icon.
 - Add New Student - Projections:** Includes a refresh icon and a menu icon.
 - SuperUser Override Projections:** Includes a refresh icon and a menu icon.
 - GSF Actuals:** Includes a refresh icon and a menu icon.
 - Student Award - Actuals:** Includes a refresh icon and a menu icon.
 - Add New Student - Actuals:** Includes a refresh icon and a menu icon.
 - SuperUser Override Actuals:** Includes a refresh icon and a menu icon.
 - Payroll Summary:** Includes a refresh icon and a menu icon.
 - GSF Comments:** Includes a refresh icon and a menu icon.
 - Person Comment Entry:** Includes a refresh icon and a menu icon.
 - Person Comment Summary:** Includes a refresh icon and a menu icon.
 - GSF User Defaults:** Includes a refresh icon and a menu icon.
 - User Defaults:** Includes a refresh icon and a menu icon.
 - GSF Documentation:** Includes a refresh icon and a menu icon.
- Work Area (Right):** This area contains the main content of the workcenter. It includes:
 - Using the GSF Workcenter:** A section with a title and a paragraph explaining the two parts of the workcenter: the Target window and the Navigation window.
 - Instructions:** A list of instructions for navigating the workcenter, including how to select navigation menus, close or open navigation windows, and adjust the size of navigation lists.

The interface also includes a "My Homepage" button in the top left corner and a "29800,17" value displayed in the work area.

Student Award - Projections Page

Projected student data is used in GSF for planning purposes, and holds student data separate from *Actual* student data. Since the data created for planning purposes is very similar to the transactional data used in the student funding process, the pages where this data is reviewed are very similar.

Student Detail

Student Award - Projections		
John Doe		
ID 1234567	Orig Acad Plan G-BIO-PHD	Acad Prog GPA&S
Duke UID 0654321	Rptg Acad Plan G-BIO-PHD	Acad Plan G-BIO-PHD
Gender F	Orig Mtr Term 1700	Matric Term 2019 Fall
Institution DUKEU	GradPack A&S, Yr 1, TA	Yr of Study 1
Aid Year 2020	Security Plan 1	# Terms 1
Career, Nbr Graduate , 0	Security Plan 2	Status Active
		LOA N

Column One

- **Name** – Student Name, pulled from Bio/Demo data in PeopleSoft
- **ID** – Emplid, pulled from PeopleSoft
- **Duke UID** – Duke Unique ID, pulled from PeopleSoft
- **Gender** – Student gender, pulled from Bio/Demo in PeopleSoft
- **Institution** – DUKEU, pulled from PeopleSoft
- **Aid Year** – Aid Year pulled from Financial Aid setup in PeopleSoft
- **Career and Career #** - Career is pulled from Student Records in PeopleSoft

Column Two

- **Orig Acad Plan** – Academic Plan originally pulled into GSF
- **Rptg Acad Plan** – Academic Plan for reporting/responsible department. Contact TGS to make any changes
- **Rptg Matr Term** – Reported Matriculation Term. Contact TGS to make any changes
- **GradPack** – GradPacks are used to add student funding sources based on academic plan and year of study
- **Security Plan 1** – Academic Plan to associate student with additional departments. Contact TGS to add additional departments
- **Security Plan 2** – Academic Plan to associate student with additional departments. Contact TGS to add additional departments

Column Three

- **Acad Prog** – Academic Program pulled from the Student Program/Plan page in PeopleSoft
- **Acad Plan** – Academic Plan pulled from Student Program/Plan page in PeopleSoft
- **Matric Term** – Term the student matriculated into the Original Acad Plan, as shown in Student Records pages.
- **Yr of Study** – The student’s year of study based on matriculation term.
- **Expected Grad Term** – Term the student is expected to graduate. (*Coming soon.*)
- **# Terms** – Total number of enrolled academic terms (not including summer)
- **Status** – Student Status pulled from the Student Program/Plan page
- **LOA** – Has the student ever had a Leave of Absence? “Y” for yes and “N” for no

Student Status

The screenshot shows a user interface for managing student status. It features a central box with the text 'Status Open' and 'Reason New'. Below this text is a button labeled 'Send to Grad School'. Below the central box, there is another button labeled 'Apply GradPack'.

GSF Student Status are as follows: *Open, Pending, and Approved.*

- **Open** – Initial Value. Student status indicates that there is (potentially) work not yet completed. Both departments and TGS can make updates to student data while in Open Status. Once complete, the student record status can be updated to Pending.
- **Pending** – Student has been submitted for review by TGS. Departments can change the status back to Open for further updates, and TGS can update the status to Approved once it has been reviewed or set it back to Open if more updates are needed
- **Approved** – Student funding has been approved. Departments can change the status back to Open if adjustments need to be made.

To reiterate – Once a student is moved to a Pending or an Approved status, DGSAs will not be able to update student funding. To update funding, DGSAs must set the student back to an Open status, and then make changes.

Change to Student Status - "Revision Needed" Email

When a student is moved by the Graduate School from a *Pending* or an *Approved* status back to an Open status, an automatic email will be sent to all DGSAs who are responsible for the student's funding. The system determines who is responsible for the student's funding by looking for users who 1) have a DGSA security role, and 2) users who also have Academic Plan security. *Note – as of GSF launch, only moves from an Approved status to an Open status will result in an email.*

Award Detail 1

		Fund Code	Locked	Rsrch Asst?	Description
Edit	Delete	0001512025	<input type="checkbox"/>	<input type="checkbox"/>	BIOLOGY INSTRUCTIONAL CODE
Edit	Delete	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA
Edit	Delete	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA
Edit	Delete	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD
Edit	Delete	0001686161	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_BIOLOGY
Edit	Delete	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN
Edit	Delete	SRF	<input type="checkbox"/>	<input type="checkbox"/>	

- **Edit** – Click Edit to update student funding (Edit will be “greyed out” if student status is Pending or Approved. Additionally, Edit will be “greyed out” if award is Locked.)
- **Delete** – Click delete to delete the row. (Delete will be “greyed out” if student status is Pending or Approved. Additionally, Delete will be “greyed out” if award is Locked.)
- **Fund Code** – Fund Code number will appear when applying the GradPack or when a new line item is added.
- **Locked** – If checked, the award is locked via the Super User page, and cannot be updated. Contact TGS to make any changes
- **Rsrch Asst?** – The award is tied to research training
- **Description** – Description of the Fund Code pulled from SAP or the name of a Placeholder fund.

Award Detail 2

Summer II 2019			Fall 2019			Spring 2020			Summer I 2020				Totals
Tuition	Fees	Stipend	Tuition	Fees	Stipend	Tuition	Fees	Stipend	Tuition	Fees	Stipend	Health Insurance	
					6000.00			6000.00					12000.00
			40.00										40.00
			158.00			158.00							316.00
			445.25			445.25							890.50
				4600.00				7250.00					11850.00
		27840.00				27840.00							55680.00
									3850.00	294.00	1833.00		5977.00
		27840.00	643.25	10600.00		27840.00	603.25	13250.00	3850.00	294.00	1833.00		86753.50

- **Term Section** – Each term for the Aid Year is listed at the top of the section
 - Each term has three columns for Tuition, Fees and Stipend
 - Dollar amounts are listed for each fund in the appropriate column
 - Term totals are listed at the bottom of each column
 - Fund Totals are displayed in the right column

Award Detail 3

Add Line Item	Add/Edit Notes	Total Stipend	25683.00
Add a Comment	Notes		
Refresh Totals	Type	Reason	

- **Total Stipend** – Aid year total for the student’s stipend is displayed below all other awards
- **Add Line Item** – Click to add another fund code to student funding
- **Add a Comment** – Click to add a Comment for a student. Comments are on another page in PeopleSoft. Additional information about [Comments at the end of this section](#).
- **Refresh Totals** – Once new funding is added, click the Refresh Total link to update the totals row
- **Add/Edit Notes** – Click to add or Edit note for student. There is additional information about [Notes at the end of this section](#).
 - If the student is in a Pending or Approved status, DGSA’s will not be able to add Notes or Comments from this page.

Add New Student – Projections Page

Adding a New Planning ID

To add a new Planning ID/Dummy Student, use the Add New Student Projection page. This page allows a user to create a new projection

Navigation – Duke Components> Graduate Student Financials> Use> Add New Student - Projections

- Navigate to the Add New Projection page.
 - Verify that the Empl ID = NEW.
 - Academic Institution = DUKEU
 - Aid Year = *current aid year*
 - Academic Career = Graduate
- Click the Add Button.

Add New Projection

[Add a New Value](#)

Empl ID 🔍

Academic Institution 🔍

Aid Year 🔍

Academic Career ▼

[Add](#)

- Default Information will include
 - The ID will be added using the next sequential number
 - D (dummy), followed by 10 digits, sequencing upward as Dummy Students are added
 - Institution, Aid Year and Career will display
- Enter or verify the following information for the student Dummy Student in the page.
 - Status should be Open, indicating the projection is ready to be reviewed by the department
 - Reason is New, indicating the projection is ready to be created and reviewed by the department. Original Academic Plan should be the creating department Academic Plan
 - Admit Term is the Fall term for the upcoming aid year
 - Reporting Academic Plan should be the creating department Academic Plan
 - Security 1 and 2 Academic Plan is for departments who might share in fiscal responsibility for a projection. When adding a student this should be left blank. If another department needs to be given access to this student's record, you will need to contact TGS to have other departments added.
- Click Save

Add New Student - Projections

ID	D100000006		
Institution	DUKEU		
Aid Year	2020		
Career	Graduate	Career Nbr	0
Acad Prog			
Acad Plan			
GSF Name	G-BIO-PHD student 12		
Status	<input type="text" value="Open"/>	Original Academic Plan	<input type="text" value="G-BIO-PHD"/>
Reason	<input type="text" value="New"/>	*Reporting Academic Plan	<input type="text" value="G-BIO-PHD"/>
*Admit Term	<input type="text" value="1700"/>	Security 1 Academic Plan	<input type="text"/>
		Security 2 Academic Plan	<input type="text"/>

- After clicking Save, the Projected Funding page will display, with the newly created Dummy Student.
 - Click Search to open the Projected Funding page.

Projected Funding
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID | begins with | D1000000006

Academic Institution | begins with | DUKEU

Academic Career | = | Graduate

Aid Year | begins with | 2020

Award Status | = | Open

Admit Term | begins with |

Duke Unique ID | begins with |

Last Name | begins with |

First Name | begins with |

Reporting Academic Plan | begins with |

Search Clear Basic Search Save Search Criteria

- The Student Award – Projections page will display the data entered into it
 - Student Name will be the selected Academic Plan and sequence number
- Click the Apply GradPack button to add the default funding package for the projection
- Select the desired GradPack Type
 - Options depend on the Reporting Academic Plan and can be Fellowship, Research Assistantship, Teaching Assistantship, Training Grant, and Other.
- Click OK

Student Award - Projections

G-BIO-PHD student 12

ID D1000000006
Duke UID
Gender
Institution DUKEU
Aid Year 2020
Career, Nbr Graduate , 0

Copy Planning IDs

Orig Acad Plan G-BIO-PHD
Rptg Acad Plan G-BIO-PHD
Orig Mtr Term 1700

Acad Prog Acad Plan
Matric Term
Yr of Study 1
Terms
Status
LOA N

Security Plan 1
Security Plan 2

Status Open
Reason New
Send to Grad School

Apply GradPack

Projections Apply GradPack

Student ID D1000000006 Aid Year 2020

GradPack Type

Warning: any and Codes will be deleted!

OK Cancel Apply

Add Line Item Add/Edit Notes Total Stipend

Notes

Type	Reason

Refresh Totals

Return to Search

- The selected funding package will be applied to the Projection, and will display on the page.
 - *Note – Screen shot below does not display entire page.*
- Funding is applied row-by-row, with award amounts displaying below the corresponding term column

Student Award - Projections

G-BIO-PHD student 12

ID D100000006
 Duke UID
 Gender
 Institution DUKEU
 Aid Year 2020
 Career, Nbr Graduate , 0

Orig Acad Plan G-BIO-PHD
 Rptg Acad Plan G-BIO-PHD
 Orig Mtr Term 1700

Acad Prog Acad Plan
 Matric Term
 Yr of Study 1
 # Terms
 Status
 LOA N

Status Open
 Reason New
 Send to Grad School

GradPack A&S, Yr 1, TA
 Security Plan 1
 Security Plan 2

Apply GradPack

Copy Planning IDs

Summer II 2019 Fall 2019

	Fund Code	Locked	Rsrch Asst?	Description	Tuition	Fees	Stipend	Tuition	Fees	Stipend
Edit Delete	0001512025	<input type="checkbox"/>	<input type="checkbox"/>	BIOLOGY INSTRUCTIONAL CODE						6000.00
Edit Delete	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA					40.00	
Edit Delete	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA					158.00	
Edit Delete	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD					445.25	
Edit Delete	0001686161	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_BIOLOGY						4600.00
Edit Delete	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN				27840.00		
Edit Delete	SRF	<input type="checkbox"/>	<input type="checkbox"/>							
Totals								27840.00	643.25	10600.00

Add Line Item Add/Edit Notes **Total Stipend 25683.00**

Notes
 Type Reason

Refresh Totals

Adding additional funding

- If a projection/student needs additional funding, click the Add Line Item hyperlink on the left side of the page.

	Fund Code	Locked	Rsrch Asst?	Description	
Edit Delete	0001512025	<input type="checkbox"/>	<input type="checkbox"/>	BIOLOGY INSTRUCTIONAL CODE	
Edit Delete	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA	
Edit Delete	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA	
Edit Delete	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD	
Edit Delete	0001686161	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_BIOLOGY	
Edit Delete	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN	
Edit Delete	SRF	<input type="checkbox"/>	<input type="checkbox"/>		
Totals					

Add Line Item Add/Edit Notes **Total Stipend**

▲ Notes
 Type Reason

Refresh Totals

- Add the correct Project/Grant (Fund Code) number.
- Check the Research Assistant box if needed.
- Click Add.

Fund Code Add

Hint: leading 000 for 1xxx and 4xxx Fund Codes

Empl ID D100000006
 Academic Institution DUKEU
 Aid Year 2020
 Academic Career Graduate
 Project/Grant: 3910044

Research Assistant?

Add Cancel

- Add the correct amount in the Tuition, Fees or Stipend column
 - Locked fields will be greyed out. (Only the Grad School can lock an award.)
 - Verify if the Research Assistant checkbox should be selected
 - Select the row corresponding to desired term to add dollar amount.
- Click OK.

Fund Code Add

ID D100000011 Aid Year 2020

Fund Code 3910044 Description

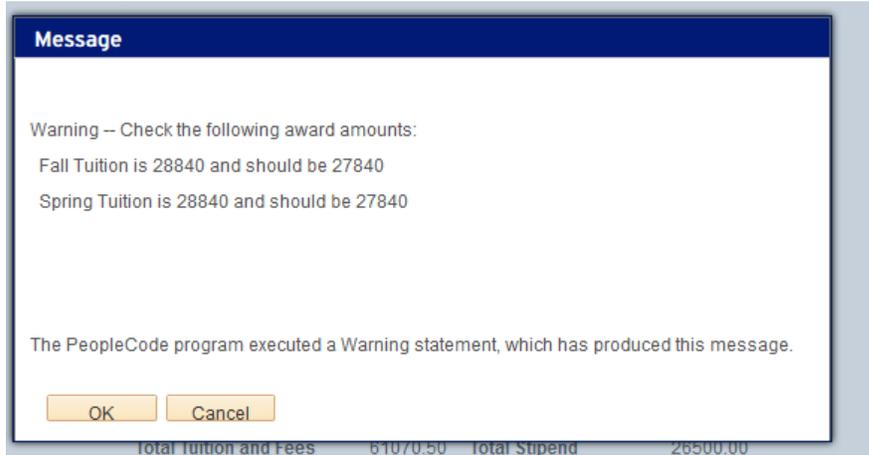
Locked Rsrch Asst? Health
Ins

Term	Descr	Tuition	Fees	Stipend
1 1690	2019 Summer Term 2	<input type="text"/>	<input type="text"/>	<input type="text"/>
2 1700	2019 Fall Term	<input type="text"/>	<input type="text"/>	<input type="text"/>
3 1710	2020 Spring Term	<input type="text"/>	<input type="text"/>	<input type="text"/>
4 1725	2020 Summer Term 1	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total Tuition and Fees 57026.50 Total Stipend 23850.00

OK Cancel Apply

- If the total Tuition or Fees for any of the semesters are incorrect, you will get a warning message letting you know the incorrect and the correct amounts.



- The funding amount will display in the correct term column

					Summer II 2019			Fall 2019			Spring 2020		
	Fund Code	Locked	Rsrch Asst?	Description	Tuition	Fees	Stipend	Tuition	Fees	Stipend	Tuition	Fees	Stipend
Edit Delete	0001512025	<input type="checkbox"/>	<input type="checkbox"/>	BIOLOGY INSTRUCTIONAL CODE						6000.00			6000.00
Edit Delete	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA				40.00					
Edit Delete	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA				158.00				158.00	
Edit Delete	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD				445.25				445.25	
Edit Delete	0001686161	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_BIOLOGY						4600.00			7250.00
Edit Delete	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN				27840.00			27840.00		
Edit Delete	3910044	<input type="checkbox"/>	<input checked="" type="checkbox"/>	REX ADAMS PROF FUND				10000.00			10000.00		
Edit Delete	SRF	<input type="checkbox"/>	<input type="checkbox"/>					▲			▲		
Totals								37840.00	643.25	10600.00	37840.00	603.25	13250.00

- When adding or deleting funding, the totals at the bottom of the Funding Grid can display outdated sums. Click the Refresh Totals hyperlink to re-sum the funding. Exiting and returning to the page will refresh the sums as well.

					Totals			27840.00	643.25	10600.00	
Add Line Item	Add/Edit Notes				Total Stipend		25683.00				
Refresh Totals	Notes										
▲	Type	Reason									

Deleting Funding

- If a funding source needs to be removed, click the Delete hyperlink.
 - Only students in an Open status can have funds deleted.
 - If a fund is locked, it cannot be removed.

		Summer II 2019			Fall 2019			Spring 2020						
		Fund Code	Locked	Rsrch Asst?	Description	Tuition	Fees	Stipend	Tuition	Fees	Stipend	Tuition	Fees	Stipend
Edit	Delete	0001512025	<input type="checkbox"/>	<input type="checkbox"/>	BIOLOGY INSTRUCTIONAL CODE						6000.00			6000.00
Edit	Delete	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA				40.00					
Edit	Delete	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA				158.00				158.00	
Edit	Delete	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD				445.25				445.25	
Edit	Delete	0001686161	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_BIOLOGY						4600.00			7250.00
Edit	Delete	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN				27840.00			27840.00		
Edit	Delete	3910044	<input type="checkbox"/>	<input checked="" type="checkbox"/>	REX ADAMS PROF FUND				10000.00			10000.00		
Edit	Delete	SRF	<input type="checkbox"/>	<input type="checkbox"/>										
Totals									37840.00	643.25	10600.00	37840.00	603.25	13250.00

- In the modal window, click Yes

Message

Do you really want to delete Fund Code 3910044, RA Flag Y? (30000,16)

- The funding will now be removed
- Click the *Refresh Totals* hyperlink to display updated totals.

		Summer II 2019			Fall 2019			Spring 2020						
		Fund Code	Locked	Rsrch Asst?	Description	Tuition	Fees	Stipend	Tuition	Fees	Stipend	Tuition	Fees	Stipend
Edit	Delete	0001512025	<input type="checkbox"/>	<input type="checkbox"/>	BIOLOGY INSTRUCTIONAL CODE						6000.00			6000.00
Edit	Delete	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA				40.00					
Edit	Delete	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA				158.00				158.00	
Edit	Delete	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD				445.25				445.25	
Edit	Delete	0001686161	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_BIOLOGY						4600.00			7250.00
Edit	Delete	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN				27840.00			27840.00		
Edit	Delete	SRF	<input type="checkbox"/>	<input type="checkbox"/>										

Editing Funding

If a student is in an *Open Status* AND if the award is not *Locked*, DGSA's can edit/update a fund code directly without having to delete it.

1. Click the Edit hyperlink next to the fund code to be updated. The Fund Code field will be in an editable status
2. DGSA's will be able to update the Fund Code field, the Research Assistant field, the Health Insurance field, and the amount fields, as needed.

GSF Projections Fund Code Edit

Fund Code Edit

Student ID D1000000010 Aid Year 2021

Fund Code 0001680031 Desc GRAD SCHOOL TRANSCRIPT FEE AWA

Locked Rsrch Asst? Health Ins

Term	Desc	Tuition	Fees	Stipend
1730	2020 Sumr2			
1740	2020 Fall		40.00	

Total Tuition and Fees 40.00 Total Stipend

OK Cancel Apply

3. Click OK to return to the main page.

DGSAs can create Dummy Students using the process described above to create and then update or edit the student. This student record can then be copied to create a larger group of Dummy Students, useful in the budgeting process. This copy process is described below.

Copying Planning IDs / Dummy Students

A larger group of Planning/Dummy Students can be created from an existing Dummy Student record. This will create a set of identical Dummy Student having the same awards. This can be used for creating records for your anticipated matric.

- Navigate to the Dummy Student to be copied.
- To create identical Planning IDs/Dummy Students, click the Copy Planning IDs hyperlink.

Student Award - Projections

G-BIO-PHD student 12

ID D1000000006	Orig Acad Plan G-BIO-PHD	Acad Prog Acad Plan Matric Term Yr of Study 1 # Terms Status LOA N
Duke UID	Rptg Acad Plan G-BIO-PHD	
Gender	Orig Mtr Term 1700	
Institution DUKEU	GradPack A&S, Yr 1, TA	
Aid Year 2020	Security Plan 1	
Career, Nbr Graduate , 0	Security Plan 2	

[Copy Planning IDs](#)

- Add the number of Planning IDs / Dummy Students needed
- Click OK.

GSF Copy Projection PlanningID

Aid Year 2020
Rptg Acad Plan G-BIO-PHD
Year of Study 1
GradPack Type Teaching Assistant

Count

OK **Cancel** **Apply**

- The Projected Funding search page will display, with the Empl ID field populated with the ID number that was used as the template
- Clear the Empl ID field, leaving in the leading “D”. Click the Search button

Projected Funding

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Empl ID begins with

Academic Institution begins with

Academic Career =

Aid Year begins with

Award Status =

Admit Term begins with

Duke Unique ID begins with

Last Name begins with

First Name begins with

Reporting Academic Plan begins with

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- A list of all Dummy IDs will be displayed
 - These IDs can be sorted by clicking any of the column names in the Header Row

Projected Funding

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Empl ID begins with

Academic Institution begins with

Academic Career =

Aid Year begins with

Award Status =

Admit Term begins with

Duke Unique ID begins with

Last Name begins with

First Name begins with

Reporting Academic Plan begins with

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

View All First 1-18 of 18 Last

Empl ID	Duke Unique ID	Aid Year	Award Status	Action Date	Name	Gender	Reporting Academic Plan	Admit Term	Short Description	Security 1 Academic Plan	Security 2 Academic Plan
D100000002	(blank)	2020	Open	07/05/2019	G-BIO-PHD student 10	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000004	(blank)	2020	Open	07/16/2019	G-BIO-PHD student 11	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000006	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 12	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000007	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 13	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000008	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 14	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000009	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 15	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000010	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 16	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000011	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 17	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000012	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 18	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000013	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 19	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000014	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 20	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000015	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 21	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000016	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 22	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000017	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 23	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000018	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 24	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000019	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 25	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000020	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 26	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)
D100000021	(blank)	2020	Open	07/23/2019	G-BIO-PHD student 27	(blank)	G-BIO-PHD	1700	2019 Fall	(blank)	(blank)

Each Dummy Student record can be reviewed and altered as needed.

Adding a Note

Notes (or tags) can be added to student records in GSF. These Notes are brief descriptions of a student situation. Notes can be added on the Projection and Actuals pages.

- Click the Add/Edit Notes hyperlink on the left side of the page. This hyperlink is under the student funding grid.

The screenshot shows a table with columns for 'Add Line Item', 'Add/Edit Notes', and 'Total Stipend'. The 'Total Stipend' value is 25683.00. A red arrow points to the 'Add/Edit Notes' link. Below the table is a 'Notes' section with a table containing 'Type' and 'Reason' columns.

- Note Type - Departmental or Graduate School. (DGSAs will only be able to select Departmental.)
- Note Reason – Select the appropriate reason. In this example, Leave of Absence Fall has been selected.
- Click the OK button.

The dialog box is titled 'GSF Notes Projections'. It contains the following information: Student ID D100000006, Institution DUKEU, Aid Year 2020, and Career Graduate. Below this is a table with 'Type' and 'Reason' columns. The first row shows '1 Departmental Note' and 'LOA Fall'. There are search, add, and minus buttons to the right of the table. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

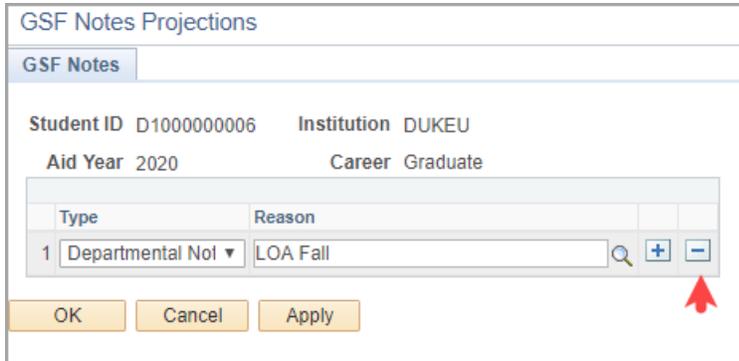
- The Note now displays in the Notes Grid.
 - All Notes added will display.

The screenshot shows the same table as before, but now the 'Notes' section contains one row: 'Departmental Note' under 'Type' and 'LOA Fall' under 'Reason'. A red arrow points to this row.

The Notes hyperlink will only be active if the student is in an Open Status.

Removing a Note

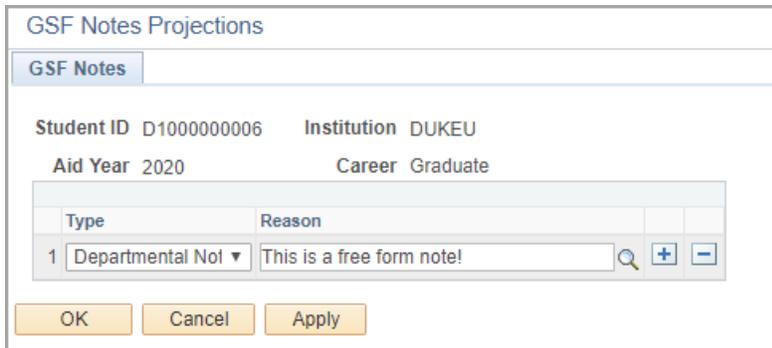
- To remove a Note, Click the Add/Edit Notes hyperlink
- Click the 'minus' sign next to the Note to remove it.
- Click OK. The Note will be removed from the student record.



The screenshot shows the 'GSF Notes Projections' dialog box. It contains fields for Student ID (D1000000006), Institution (DUKEU), Aid Year (2020), and Career (Graduate). Below these is a table with columns 'Type' and 'Reason'. The first row shows 'Departmental NoI' and 'LOA Fall'. To the right of the table are search, add (+), and minus (-) icons. A red arrow points to the minus icon. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

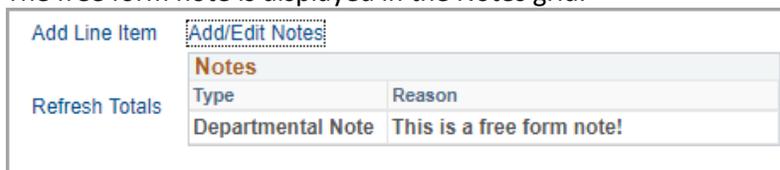
Adding a Free Form Note

- To add a note with Free Form text, click the Add/Edit Notes hyperlink.
- Select *Departmental* Type
- Type the free form text in the *Reason* field.
 - There is a 30 character limit on this field
- Click OK



The screenshot shows the 'GSF Notes Projections' dialog box. It contains fields for Student ID (D1000000006), Institution (DUKEU), Aid Year (2020), and Career (Graduate). Below these is a table with columns 'Type' and 'Reason'. The first row shows 'Departmental NoI' and 'This is a free form note!'. To the right of the table are search, add (+), and minus (-) icons. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

- The free form note is displayed in the Notes grid.



The screenshot shows a 'Notes' grid. On the left are 'Add Line Item' and 'Refresh Totals' buttons. The grid has columns 'Type' and 'Reason'. The first row shows 'Departmental Note' and 'This is a free form note!'.

Adding a Comment

Comments allow users to add more detailed information about students. New comments can be added from both the Projections and Actuals pages by using the Add a Comment hyperlink. Existing comments can be reviewed using the *Review Comments* hyperlink. *Note – Dummy Students cannot have Comments added.*

Add a Comment

- Click the Add a Comment hyperlink.

The screenshot shows a table with columns 'Add Line Item', 'Add/Edit Notes', and 'Total Stipend'. A red arrow points to the 'Add a Comment' link in the 'Add/Edit Notes' column. Below the table, there is a 'Refresh/Show 0' button and a table with columns 'Type' and 'Reason'.

- A modal window will pop-up. Values for the following fields will be filled in.

Administrative Function – FINA	Comment Category – GSFCOM
Academic Institution – Duke University	Variable Data – Aid Year
- Add comments in the Comments field. If a Comment is being added, only the top Comments field is open.

The screenshot shows the 'Personal Comments' modal window. It includes a 'Person Comment Entry' section with fields for 'Comment DateTime' (08/29/2019 3:47:05PM), '*Administrative Function' (FINA), '*Academic Institution' (Duke University), and '*Comment Category' (GSFCOM). A 'Variable Data' dialog box is open, showing 'Aid Year 2020' and 'Financial Aid Year 2019-2020'. The 'Comment Data' section has fields for 'Comment ID', 'Department', and 'Comment Date' (08/29/2019), followed by a large 'Comments' text area and an 'Append Comments' section. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

- Click Save. Click the small box in the upper right corner to close window.

Reviewing / Editing a Comment

Once added, a Comment(s) can be reviewed by clicking the View Comments link, or by navigating to the Person Comments page (via the Work Center Navigation pane). *Note – Dummy Students cannot have Comments.*

- To view or edit a comment, click the View Comments hyperlink.
 - Note – The View Comments hyperlink only appears if there has already been a comment added.

Add Line Item	Add/Edit Notes	Total Stipend				
Add a Comment	Notes					
 View Comments	<table border="1"><thead><tr><th>Type</th><th>Reason</th></tr></thead><tbody><tr><td></td><td></td></tr></tbody></table>	Type	Reason			
Type	Reason					
Refresh Totals						

- A modal window will popup. The student Emplid, the Administrative Function and the Comment Category will be populated.
- Click Search.

Person Comment Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

ID	begins with	<input type="text"/>	<input type="button" value="Q"/>
Sequence Number	=	<input type="text"/>	
Administrative Function	begins with	FINA	<input type="button" value="Q"/>
Comment Category	begins with	GSFCOM	<input type="button" value="Q"/>
Academic Institution	begins with	<input type="text"/>	<input type="button" value="Q"/>
Comment Date	=	<input type="text"/>	<input type="button" value="B"/>
National ID	begins with	<input type="text"/>	
Duke Unique ID	begins with	<input type="text"/>	
Last Name	begins with	<input type="text"/>	
First Name	begins with	<input type="text"/>	

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- Person Comment page will pop up.
- Initial comment will display in the Comments field for review. This field will not be editable.
- To add an update to the comment, use the Append Comments field.
- After the comment is added, click Save.
- The Appended Comment will be moved to the Comments field.

Person Comment Entry

██████████ ID ██████████

Comment DateTime 10/02/2019 12:35:36PM

*Administrative Function FINA Financial Aid

*Academic Institution Duke University

*Comment Category GSFCOM Graduate Student Financials Variable Data

Comment Data

Comment ID ██████████ ██████████

Department ██████████

Comment Date 10/02/2019

Comments Student will be on loan to Biology Department for the term.

Append Comments Student has changed mind, and will be returning to Global Health

Save
Return to Search
Notify
Add
Update/Display

Deleting a Projected/Planning ID

If a Planning ID / Dummy Student is added inadvertently, or if a department's planning needs change, it may be required that a Planning ID be deleted. Planning IDs can be deleted on an individual basis.

- Click the Delete this Student from the Database hyperlink at the bottom of the page.

Add Line Item	Add/Edit Notes	Total Stipend	25683.00
Refresh Totals	Notes		
	Type	Reason	
	Departmental Note	This is a free form note!	
			 Delete this Student from the Database
Return to Search	Previous in List	Next in List	

- Click Yes in the pop-up window.

Message
Do you really want to delete all records for Student Emplid D1000000006 in Aid Year 2020? (30000,7)
<input type="button" value="Yes"/> <input type="button" value="No"/>

- The dummy ID will be deleted.
 - Be Cautious – This action cannot be undone.

Student Award – Actuals Page

Student data in the Actuals pages in GSF is used for tracking and reporting on the funding Graduate Students receive at Duke University. This page looks very similar to the Projections page used early in the year, but the data seen here is copied from those projections pages. There are several important distinctions between the Actuals pages and the Projections pages. First, there are no *Dummy* IDs in the Actuals pages. Dummy IDs are used for planning purposes, and are therefore not in the Actuals pages. Also, newly matriculated students can be found in the Actuals pages – these are the students who have replaced the Dummy IDs in the Projection pages. Finally, data in the Actuals tables will be pushed over into the Financial Aid system in PeopleSoft once The Graduate School starts the process.

Student Detail

Student Award - Actuals		
Jane Doe		
Student ID 1234567	Orig Acad Plan G-STA-PHD	Acad Prog GPA&S
Duke UID 0654321	Rptg Acad Plan G-STA-PHD	Acad Plan G-STA-PHD
Gender F	Orig Adm Term 1740	Matric Term 2020 Fall
Institution DUKEU		Yr of Study 1
Aid Year 2021	GradPack A&S, Yr 1, TA	# Terms
Career, Nbr Graduate , 0	Security Plan 1	Status Admitted
	Security Plan 2	LOA N
		Exp Grad 1990

Column One – Column One is data held in the Campus Community Bio-Demo pages

- **Name** – Student Name, pulled from Bio/Demo data in PeopleSoft
- **Student ID** – Emplid, pulled from PeopleSoft
- **Duke UID** – Duke Unique ID, pulled from PeopleSoft
- **Gender** – Student gender, pulled from Bio/Demo in PeopleSoft
- **Institution** – DUKEU, pulled from PeopleSoft
- **Aid Year** – Aid Year pulled from Financial Aid setup in PeopleSoft
- **Career and Career #** - Career and Career # is pulled from Student Records in PeopleSoft

Column Two – Column Two is data held in GSF, and used by GSF for processing

- **Orig Acad Plan** – Academic Plan originally pulled into GSF
- **Rptg Acad Plan** – Academic Plan for reporting/responsible department. Contact TGS to make any changes
- **Rptg Admit Term** – Original Matriculation Term. Contact TGS to make any changes
- **GradPack** – GradPacks are used to add student funding sources based on academic plan and year of study
- **Security Plan 1** – Academic Plan to associate student with additional departments. Contact TGS to add additional departments
- **Security Plan 2** – Academic Plan to associate student with additional departments. Contact TGS to add additional departments

Column Three – Column Three is data held in the Academic Program Plan pages

- **Acad Prog** – Academic Program pulled from the Student Program/Plan page in PeopleSoft
- **Acad Plan** – Academic Plan pulled from Student Program/Plan page in PeopleSoft
- **Matric Term** – Term the student matriculated into the Original Acad Plan, pulled from Student Program/Plan page
- **Yr of Study** – The student’s year of study based on matriculation term.
- **Expected Grad Term** – Term the student is expected to graduate. (*Coming soon.*)
- **# Terms** – Total number of enrolled academic terms (not including summer)
- **Status** – Student Status pulled from the Student Program/Plan page
- **LOA** – Has the student ever had a Leave of Absence? “Y” for yes and “N” for no

Student Status

The screenshot shows a user interface for student status. It features a central box with the text 'Status Open' and 'Reason New'. Below this text is a button labeled 'Send to Grad School'. Below the central box, there is another button labeled 'Apply GradPack'.

GSF Student Status are as follows: *Open, Pending, and Approved.*

- **Open** – Initial Value. Student status indicates that there is (potentially) work not yet completed. Both departments and TGS can make updates to student data while in Open Status. Once complete, the student record status can be updated to Pending.
- **Pending** – Student has been submitted for review by TGS. Departments can change the status back to Open for further updates, and TGS can update the status to Approved once it has been reviewed or set it back to Open if more updates are needed
- **Approved** – Student funding has been approved. Departments can change the status back to Open if adjustments need to be made.

To reiterate – Once a student is moved to a Pending or an Approved status, DGSAs will not be able to update student funding. To update funding, DGSAs must set the student back to an Open status, and then make changes.

Change to Student Status - "Revision Needed" Email

When a student is moved by the Graduate School from a *Pending* or an *Approved* status back to an Open status, an automatic email will be sent to all DGSAs who are responsible for the student's funding. The system determines who is responsible for the student's funding by looking for users who 1) have a DGSA security role, and 2) users who also have Academic Plan security.

Award Detail 1

		Fund Code	Locked	Rsrch Asst?	Description
Edit	Cancel	0001524830	<input type="checkbox"/>	<input type="checkbox"/>	ISDS
Edit	Cancel	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA
Edit	Cancel	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA
Edit	Cancel	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD
Edit	Cancel	0001686162	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_STATIST
Edit	Cancel	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN
Edit	Cancel	SRF	<input type="checkbox"/>	<input type="checkbox"/>	Smr Res Fellowship
					Totals

- **Edit** – Click Edit to update student funding (Edit will be “greyed out” if student status is Pending or Approved. Additionally, Edit will be “greyed out” if award is Locked.)
- **Cancel** – Click Cancel to cancel the funding. Awards in the Actuals pages cannot be completely deleted via the Edit or Cancel links like they can in the Projections pages. This is because the funding has been sent to the Financial Aid module, and any change to funding needs to be changed in GSF first, and then pushed over to Financial Aid. (This means that if an award is cancelled, the line item will stay on the student’s record, but in most cases it will be hidden. To view the hidden line item, click on the “Refresh/Show \$0” link.)
 - The Cancel link will be “greyed out” if student status is Pending or Approved. To cancel the award, move student back to an Open status.
 - The Cancel link will be “greyed out” if award is Locked. Contact the Graduate School if you need to cancel a locked award.
- **Fund Code** – Fund Code number will appear when applying the GradPack or when a new line item is added.
- **Locked** – If checked, the award is locked via the Super User page, and cannot be updated. Contact TGS to make any changes
- **Rsrch Asst?** – The award is tied to research training
- **Description** – Description of the Fund Code pulled from SAP or the name of a Placeholder fund.

Award Detail 2

Summer II 2020			Fall 2020			Spring 2021			Summer I 2021				Totals
Tuition	Fees	Stipend	Tuition	Fees	Stipend	Tuition	Fees	Stipend	Tuition	Fees	Stipend	Health Insurance	
		1220.00			4880.00			6100.00					12200.00
				40.00									40.00
				166.00			166.00						332.00
				457.25			457.25						914.50
		1210.00			4840.00			6050.00					12100.00
			28950.00			28950.00							57900.00
									4000.00	302.00	1833.00		6135.00
	2430.00		28950.00	663.25	9720.00	28950.00	623.25	12150.00	4000.00	302.00	1833.00		89621.50

- **Term Section** – Each term for the Aid Year is listed at the top of the section

- Each term has three columns for Tuition, Fees and Stipend
- Dollar amounts are listed for each fund in the appropriate column
- Term totals are listed at the bottom of each column
- Fund Totals are displayed in the right column

Award Detail 3

Add Line Item	Add/Edit Notes	Total Stipend	26133.00
Add a Comment	Notes		
	Type	Reason	Date
Refresh/Show \$0			

[Delete this Student from the Database](#)

- **Total Stipend** – Aid year total for the student’s stipend is displayed below all other awards
- **Add Line Item** – Click to add another fund code to student funding
- **Add a Comment** – Click to add a Comment for a student. Comments are on another page in PeopleSoft. Additional information about [Comments at the end of the Projections section](#).
- **Refresh/Show \$0** – If a funding row has been zeroed out (amounts reduced to \$0), by default that row will not display. Click the Refresh/Show \$0 link to display these rows.
- **Add/Edit Notes** – Click to add or Edit notes for student. There is additional information about [Notes at the end of the Projections section](#).
 - If the student is in a Pending or Approved status, DGSA’s will not be able to add Notes or Comments from this page.
- **Delete this Student from the Database** – Students can be deleted from GSF if they have been created in error. Please contact the Graduate School if you need to delete a student.

Updating an Existing Student

Adding additional funding

- If a student needs additional funding, click the Add Line Item hyperlink on the left side of the page.

		Fund Code	Locked	Rsrch Asst?	Description	
Edit	Cancel	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA	
Edit	Cancel	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA	
Edit	Cancel	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD	
Edit	Cancel	0001686162	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_STATIST	
Edit	Cancel	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN	
Edit	Cancel	SRF	<input type="checkbox"/>	<input type="checkbox"/>	Smr Res Fellowship	
					Totals	

[Add Line Item](#) ▶ [Add/Edit Notes](#) Total Stipend
[Add a Comment](#) Notes

Type	Reason	Date

[Refresh/Show \\$0](#)

- Add the correct Project/Grant (Fund Code) number.
- Check the Research Assistant box if needed.
- Click Add.

Fund Code Add

Hint: leading 000 for 1xxx and 4xxx Fund Codes

Empl ID 12345467
 Academic Institution DUKEU
 Aid Year 2021
 Academic Career Graduate
 Project/Grant
 Research Assistant?

- Add the correct amount in the Tuition, Fees or Stipend column
 - Locked field will be greyed out. (Only the Grad School can lock or unlock an award.)
 - Verify if the Research Assistant checkbox should be selected
 - Select the row corresponding to desired term to add dollar amount.
- (Optional) Click Apply. The Total fields on the bottom row should update.
- Click OK.

Fund Code Add

Student ID: [REDACTED] Aid Year: [REDACTED]

Fund Code: 3910044 Description: REX ADAMS PROF FUND

Locked Rsrch Asst? Health: [REDACTED] Term: [REDACTED]

Term	Descr	Tuition	Fees	Stipend
1 1770	2021 Summer Term 2			
2 1780	2021 Fall Term			10000
3 1790	2022 Spring Term			
4 1805	2022 Summer Term 1			
Total Tuition and Fees				3050.00

OK Cancel Apply

- If the total Tuition or Fees for any of the semesters are incorrect, you will get a warning message letting you know the incorrect and the correct amounts.

Message

Warning -- Check the following award amounts:
 Fall Tuition is 28840 and should be 27840
 Spring Tuition is 28840 and should be 27840

The PeopleCode program executed a Warning statement, which has produced this message.

OK Cancel

- The funding amount will display in the correct term column

		Summer II 2020			Fall 2020					
	Fund Code	Locked	Rsrch Asst?	Description	Tuition	Fees	Stipend	Tuition	Fees	Stipend
Edit	Cancel	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA					120.00
Edit	Cancel	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA					162.75
Edit	Cancel	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD					457.25
Edit	Cancel	0001686162	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_STATIST		2430.00			9720.00
Edit	Cancel	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN			28950.00		
Edit	Cancel	3910044	<input type="checkbox"/>	<input checked="" type="checkbox"/>	REX ADAMS PROF FUND		1000.00			
Edit	Cancel	SRF	<input type="checkbox"/>	<input type="checkbox"/>	Smr Res Fellowship					
Totals						3430.00	28950.00	740.00	9720.00	

- When adding or deleting funding, the totals at the bottom of the Funding Grid can display outdated sums. Click the Refresh Totals hyperlink to re-sum the funding. Existing and returning to the page will refresh the sums as well.

Totals				3430.00	28950.00	740.00	9720.00
Add Line Item	Add/Edit Notes	Total Stipend		27133.00			
Add a Comment	Notes						
	Type	Reason	Date				
Refresh/Show \$0							

Canceling Funding

- If a funding source needs to be cancelled, click the Cancel hyperlink.
 - Only students in an Open status can have funds cancelled.
 - If a fund is locked, it cannot be cancelled.

		Summer II 2020			Fall 2020					
	Fund Code	Locked	Rsrch Asst?	Description	Tuition	Fees	Stipend	Tuition	Fees	Stipend
Edit	Cancel	0001680031	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL TRANSCRIPT FEE AWA				120.00	
Edit	Cancel	0001680032	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL RECREATION FEE AWA				162.75	
Edit	Cancel	0001686126	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCHOOL FEE AWARD PHD				457.25	
Edit	Cancel	0001686162	<input type="checkbox"/>	<input type="checkbox"/>	GRAD AWARDS FELLOWSHIP_STATIST		2430.00			9720.00
Edit	Cancel	0001689142	<input type="checkbox"/>	<input type="checkbox"/>	GRAD SCH TUITION AWARD_ARTS AN			28950.00		
Edit	Cancel	3910044	<input type="checkbox"/>	<input checked="" type="checkbox"/>	REX ADAMS PROF FUND		1000.00			
Edit	Cancel	SRF	<input type="checkbox"/>	<input type="checkbox"/>	Snr Res Fellowship					
Totals							3430.00	28950.00	740.00	9720.00

- In the modal window, click Yes

Message

Do you really want to cancel Fund Code 3910044? (30000,2)

- The funding will now be cancelled/zeroed out
- Click the *Refresh/Show \$0* hyperlink to display \$0 totals.

Editing Funding

If a student is in an *Open Status AND if the award is not Locked*, DGSA's can edit/update a fund code directly without having to delete it.

1. Click the Edit hyperlink next to the fund code to be updated. The Fund Code field will be in an editable status
2. DGSA's will be able to update the Fund Code field, the Research Assistant field, the Health Insurance field, and the amount fields, as needed.
3. If you need to zero-out the amount for one term (Tuition or Fees), but need to leave the dollar amount for a different term unchanged, make the changes you need, and then click the Override checkbox in the corresponding Term. You can then click the Apply button to see the changes made, or simply click OK.
 - a. Example – in the image below, if you need to remove funding for Tuition for Fall term, but need to leave Tuition intact for Spring Term, 1) remove the \$27840 amount in Fall term, and then 2) click the Override checkbox for Fall term.
 - b. Note – Do NOT use the override checkbox if you are simply making a change to the amount for an award. For example if you are updating a Fee from \$1250 to \$1150, then simply make the change and click OK.

Student Fund Code Edit

Student ID [REDACTED] Aid Year 2021

Fund Code 0001689142 Descr GRAD SCH TUITION AWARD_ARTS AN
 Locked Rsrch Asst? Health [REDACTED] Term [REDACTED] Ins

Term	Desc	Tuition	Fees	Stipend	Override
1740	2020 Fall				<input checked="" type="checkbox"/>
1750	2021 Sprng	27840.00			<input type="checkbox"/>
1765	2021 Sumr1				<input type="checkbox"/>

Total Tuition and Fees 59832.00 Total Stipend 32633.32

OK Cancel Apply

4. (Optional) Click Apply to update totals at the bottom of the grid.
5. Click OK to return to the main page.
6. Review any Error or Warning messages. Click OK if appropriate. If not, Click Cancel and correct the funding.
7. Funding will be updated and displayed on the Student Awards – Actuals page.

Adding and Removing Notes for Actuals

The Note Functionality is shared between Projections and Actuals in GSF. Please see the [Notes](#) section in the previous pages.

Adding Comments for Actuals

Like Notes, Comments are shared functionality. Please see the section on [Comments](#) in the previous pages.

Reports

GSF provides a set of reports that can be run directly from the WorkCenter. To access these reports, click the Reports tab in the GSF WorkCenter.

DGSAs will only be able to see students in Academic Plans were they have security.

- Click the Reports tab
- Click the Run GSF Reports link



The screenshot shows the GSF Workcenter interface. The top navigation bar includes 'GSF', 'Reports', and 'Student Info'. The 'Reports' tab is selected. Below the navigation bar, there is a sidebar with 'GSF Reports & Queries' and a list of options: 'Query Manager', 'Composite Query Manager', and 'Run GSF Reports' (highlighted with a red arrow). The main content area is titled 'Department Center' and 'GSF Report Center'. It contains a search bar and a table of reports.

Department Center

GSF Report Center

The queries that you have access to are listed below. Click on the Run Query hyperlink next to the query you would like to run. If you can't find the query you are looking for use the Search Queries button to find your query.

Search Queries

Query	Description	Comments	Run to Page	Run to Excel
1 GSF Projected Student Line Itm	Projected Student Line Item report	Projections - Student Line Item	Run to Page	Run to Excel
2 GSF Projected Fund Code Rpt	GSF - Projected Student Fund Code Report	Projections - Fund Code Report	Run to Page	Run to Excel
3 GSF Projected Fund Cd Summary	GSF - Projected Student Fund Code Summary Report	Projections - Fund Code Summary	Run to Page	Run to Excel

List of Reports

This list is current as of May 20, 2020

Query	Description	Comments
Actuals Fd Cd Report, by Plan	Actuals Student Fund Code Report, by Plan. Listing of each student in a selected Academic Plan, with a sum of Tuition, Fees, Stipend and Health Insurance funding.	Actuals - Fund Code Sum, by Plan
Actuals Fund Code Report	Actuals Student Fund Code Report. Listing of each student in GSF, with a sum of Tuition, Fees, Stipend and Health Insurance funding.	Actuals - Fund Code Summary
Actuals Fund Cd Summary	Actuals Student Fund Code Summary Report	Actuals - Fund Code Summary
Actuals Student Line Itm All	Actuals Student Line Item report, all academic plans.	Actuals - Student Line Item All
Actuals Stdnt Ln Itm, by Plan	Actuals Student Line Item report, prompted by academic plan.	Actuals - Student Line Item, by Acad Plan
GSF-DGSA Role, w/Plan Security	List of Active users with the STORM/DGSA role, joined to their Acad Plan Security. Only users with the DGSA Role assigned already with display on this report.	List of DGSAs, with Email and AcadPlan Security
GSF Search by NetID for Access	Search by NetID/UserID to determine if person has GSF access. Message displays detailing NetID Access, as well as showing what Academic Plan security is associated with the NetID. .	Search for NetID, review SecRole and Plan
Projected Student Line Itm All	Projected Student Line Item report, all academic plans.	Projections - Student Line Item All
Projected Stdnt Line Itm/Plan	Projected Student Line Item report, prompt for reporting academic plan.	Projections - Student Line Item, by plan
Projectd Fund Code Report /Pln	Projected Student Fund Code Report, prompted by Reporting Academic Plan.	Projections - Fund Code Report, by plan
Projected Fund Code Report	Projected Student Fund Code Report	Projections - Fund Code Report
Projected Fund Cd Summary	Projected Student Fund Code Summary Report	Projections - Fund Code Summary